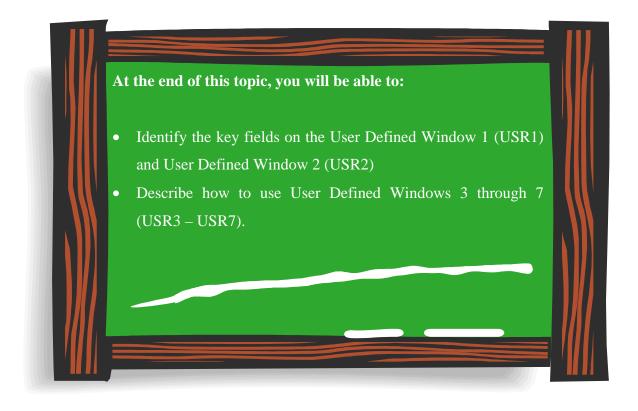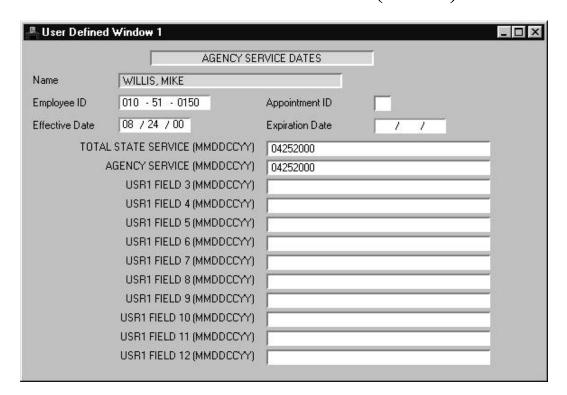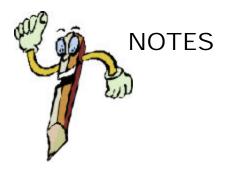# TOPIC 6: USER DEFINED WINDOWS

The purpose of this topic is to provide an overview of the nine User Defined windows that can track additional employee information. These windows allow agencies to record additional information that is not captured elsewhere in the SAM II HR/Payroll System. Each of the User Defined Windows 1-7 (USR1-7) contains fields that are used to record special conditions and specific information associated with an employee, such as tickler dates for certain personnel/payroll actions or dates needed to calculate service tenure.

At the end of this topic, you will be able to:

- Identify the key fields on the User Defined Window 1 (USR1) and User Defined Window 2 (USR2)
- Describe how to use User Defined Windows 3 through 7 (USR3 – USR7).

USER DEFINED WINDOW 1 (USR1)

```
User Defined Window 1                                    [_][□][X]

                    AGENCY SERVICE DATES

Name            WILLIS, MIKE

Employee ID     010  - 51  - 0150        Appointment ID    [  ]

Effective Date  08 / 24 / 00             Expiration Date    /   /

          TOTAL STATE SERVICE (MMDDCCYY)   04252000
             AGENCY SERVICE (MMDDCCYY)     04252000
               USR1 FIELD 3 (MMDDCCYY)
               USR1 FIELD 4 (MMDDCCYY)
               USR1 FIELD 5 (MMDDCCYY)
               USR1 FIELD 6 (MMDDCCYY)
               USR1 FIELD 7 (MMDDCCYY)
               USR1 FIELD 8 (MMDDCCYY)
               USR1 FIELD 9 (MMDDCCYY)
              USR1 FIELD 10 (MMDDCCYY)
              USR1 FIELD 11 (MMDDCCYY)
              USR1 FIELD 12 (MMDDCCYY)
```

NOTES

HOW DO I USE A USER DEFINED WINDOW?

So you've looked everywhere and there is not a field anywhere in any of the transactions we've talked about to track the one little thing your agency wants to track. What do you do? Say, "Oh well, I didn't want to track that information any way." Chances are that's not going to cut it with your agency. Instead, you can use one of the nine user defined windows to track that important employee information.
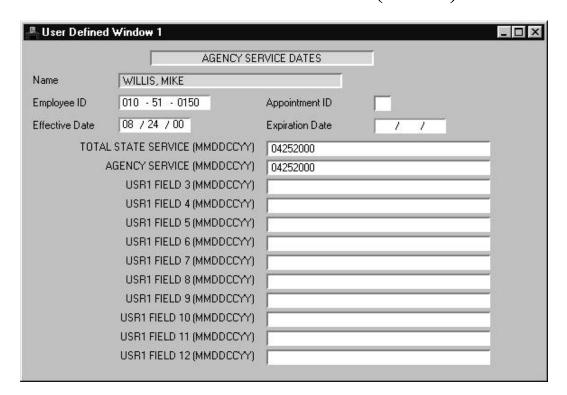
Each of the User Defined Windows 1-7 (USR1-7) contains fields in which to record special conditions and specific information associated with an employee.
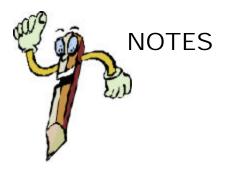
User Defined Windows 1 and 2 (USR1 and USR2) have fields that have been predefined by SAM II HR/Payroll System. Even though these two windows look exactly like the other five, SAM II HR/Payroll System has determined what type of information should be entered into the fields on these windows. This allows for similar types of information to be entered statewide on these two windows.

User Defined Windows 3 through 7 (USR3 – USR7) can be designed at the discretion of your agency to capture desired information.

Let's take a look at USR1 and USR2.

USER DEFINED WINDOW 1 (USR1)

```
User Defined Window 1                                    [_][□][X]

                        AGENCY SERVICE DATES

Name            WILLIS, MIKE

Employee ID     010  - 51  - 0150    Appointment ID     [  ]

Effective Date  08 / 24 / 00         Expiration Date      /   /

        TOTAL STATE SERVICE (MMDDCCYY)    04252000
           AGENCY SERVICE (MMDDCCYY)      04252000
              USR1 FIELD 3 (MMDDCCYY)    [              ]
              USR1 FIELD 4 (MMDDCCYY)    [              ]
              USR1 FIELD 5 (MMDDCCYY)    [              ]
              USR1 FIELD 6 (MMDDCCYY)    [              ]
              USR1 FIELD 7 (MMDDCCYY)    [              ]
              USR1 FIELD 8 (MMDDCCYY)    [              ]
              USR1 FIELD 9 (MMDDCCYY)    [              ]
             USR1 FIELD 10 (MMDDCCYY)    [              ]
             USR1 FIELD 11 (MMDDCCYY)    [              ]
             USR1 FIELD 12 (MMDDCCYY)    [              ]
```

NOTES

USER DEFINED WINDOW 1 (USR1)

The User Defined Window 1 (USR1) contains twelve fields, and is specifically designed to record dates. The first field is established to track the employee's total state service; the second field is to track service within the agency. Agencies are encouraged to utilize the first and second fields of this window by entering information as instructed below.

Let's look at the User Defined Window 1 (USR1).

Step 1 To open USR1 from the SAM II Desktop Navigator window, click on the Go To icon. Type USR1 in the "CODE". Click on the Open button.

Step 2 Let's look at the fields to gain an understanding of each.

> **NAME** – Inferred. Displays the employee's full name (last name, first name, and middle initial.
>
> **EMPLOYEE ID** – Required. Enter the employee's social security number. Type **010-51-0150**.
>
> Select **Display: Browse Data**.

Step 3 Populate the remaining fields on the USR1.

> **APPOINTMENT ID** – Conditional. If an employee holds more than one position, enter the appointment identification number to indicate which position is affected. Leave blank to indicate the employee's primary appointment.
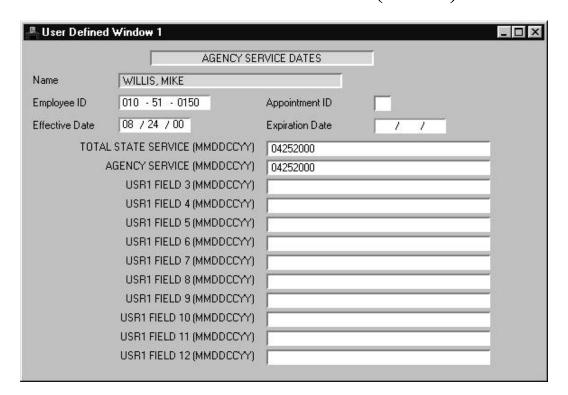>
> **EFFECTIVE DATE** – Required. Enter the date the employee information is effective.
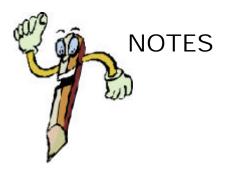>
> **EXPIRATION DATE** – Required. If you leave this field blank, it will default to 99/99/99. If an employee is inactivated on the ESMT, this date must be changed to reflect the employee inactivation date.
>
> **TOTAL STATE SERVICE** – Optional. Enter employee's initial state service date (mm/dd/yy) in the first of the twelve available fields. If the employee has not previously worked for another state agency, this would be their initial start date. If the employee has prior state service, this date is calculated to include such service. For prior continuous state service, enter the initial employment start date; for prior service that included break(s), this date would be calculated by subtracting the break period(s) from the total service.
>
> **AGENCY SERVICE** – Optional. Enter employee's agency hire date (mm/dd/yy) in the second of the twelve available fields. If the employee has prior agency service, this date is calculated to include such service.
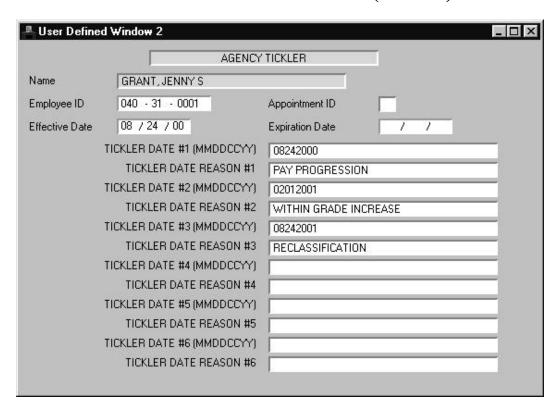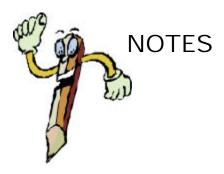
USER DEFINED WINDOW 1 (USR1)

```
User Defined Window 1                                    [_][□][X]

                          AGENCY SERVICE DATES

Name              WILLIS, MIKE

Employee ID       010 - 51 - 0150       Appointment ID    [  ]

Effective Date    08 / 24 / 00          Expiration Date       /   /

        TOTAL STATE SERVICE (MMDDCCYY)   04252000
           AGENCY SERVICE (MMDDCCYY)     04252000
            USR1 FIELD 3 (MMDDCCYY)      [                    ]
            USR1 FIELD 4 (MMDDCCYY)      [                    ]
            USR1 FIELD 5 (MMDDCCYY)      [                    ]
            USR1 FIELD 6 (MMDDCCYY)      [                    ]
            USR1 FIELD 7 (MMDDCCYY)      [                    ]
            USR1 FIELD 8 (MMDDCCYY)      [                    ]
            USR1 FIELD 9 (MMDDCCYY)      [                    ]
           USR1 FIELD 10 (MMDDCCYY)      [                    ]
           USR1 FIELD 11 (MMDDCCYY)      [                    ]
           USR1 FIELD 12 (MMDDCCYY)      [                    ]
```

NOTES

USER DEFINED WINDOW 1 (USR1)

The ten remaining fields on the USR1 are also designed to record dates and are optional for agency use. These fields may be used at an agency's discretion to track dates specific to particular events or actions associated with an employee, such as eligibility dates for particular advancements, reclassifications, time in class, etc. If an agency chooses to use the discretionary fields, they must specifically and consistently use the same fields to capture the same type of information. For instance, if the third field is intended to record salary advancement eligibility, that field must be used for that purpose for all employees in the agency.

After completing the USR1 window you need to select **Process: Update** to successfully add the transaction.

USER DEFINED WINDOW 2 (USR2)

NOTES

USER DEFINED WINDOW 2 (USR2)

The User Defined Window 2 (USR2) contains twelve fields, and is specifically designed for tickler dates and reasons. The fields will be identified as "Tickler #1" and "Tickler Date Reason #1", through "Tickler #6" and "Tickler Date Reason #6". Agencies who choose to utilize this window must internally define their uses for each of the fields on this window, and consistently use the fields for the specified purpose for all employees in the agency.

Let's look at the User Defined Window 2 (USR2).

Step 1 To open USR2 from the SAM II Desktop Navigator window, click on the Go To icon. Type USR2 in the "CODE". Click on the Open button.

Step 2 Let's look at the fields to gain an understanding of each.

NAME – Inferred. Displays the employee's full name (last name, first name, and middle initial.

EMPLOYEE ID – Required. Enter the employee's social security number. Type **010-51-0150**.
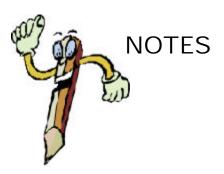
Select **Display: Browse Data.**

Step 3 Populate the remaining fields on the USR2.

APPOINTMENT ID – Conditional. If an employee holds more than one position, enter the appointment identification number to indicate which position is affected. Leave blank to indicate the employee's primary appointment.

EFFECTIVE DATE – Required. Enter the date the employee information is effective.

EXPIRATION DATE – Required. If you leave this field blank, it will default to 99/99/99. If an employee is inactivated on the ESMT, this date must be changed to reflect the employee inactivation date.

USER DEFINED WINDOW 2 (USR2)


```
User Defined Window 2                                    [_][□][X]

                          AGENCY TICKLER

Name              GRANT, JENNY S

Employee ID       040  - 31  - 0001      Appointment ID    [  ]

Effective Date    08  / 24  / 00         Expiration Date      /    /

              TICKLER DATE #1 (MMDDCCYY)   08242000
              TICKLER DATE REASON #1       PAY PROGRESSION
              TICKLER DATE #2 (MMDDCCYY)   02012001
              TICKLER DATE REASON #2       WITHIN GRADE INCREASE
              TICKLER DATE #3 (MMDDCCYY)   08242001
              TICKLER DATE REASON #3       RECLASSIFICATION
              TICKLER DATE #4 (MMDDCCYY)
              TICKLER DATE REASON #4
              TICKLER DATE #5 (MMDDCCYY)
              TICKLER DATE REASON #5
              TICKLER DATE #6 (MMDDCCYY)
              TICKLER DATE REASON #6
```

NOTES

USER DEFINED WINDOW 2 (USR2)

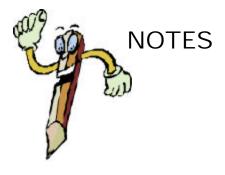**Step 3** Continue to populate the remaining fields on the USR2.

TICKLER #1 – Optional. Leave blank or enter the date (mm/dd/ccyy) to indicate when further action regarding an employee is required.

TICKLER DATE REASON #1 – Optional. Enter the reason of the action.

TICKLER #2 – Optional. Leave blank or enter the date (mm/dd/ccyy) to indicate when further action regarding an employee is required.

TICKLER DATE REASON #2 – Optional. Enter the reason of the action.

TICKLER #3 – Optional. Leave blank or enter the date (mm/dd/ccyy) to indicate when further action regarding an employee is required.

TICKLER DATE REASON #3 – Optional. Enter the reason of the action.

After completing the USR2 window you need to select **Process: Update** to successfully add the transaction.

USER DEFINED WINDOW 3 (USR3)

NOTES

USER DEFINED WINDOWS 3-7

The User Defined Windows 3 through 7 (USR3 – USR7) can be individually designed at the discretion of each agency to capture desired information. Agencies who choose to utilize these windows must internally define their uses for each field on the windows, and consistently use the fields for the specified purpose for all employees in the agency. If the fields are used, enter your assigned agency identification code as the first character of information put in any field.

NOTE: Information entered on USR1-USR7 windows are tied to the Employee ID and Appointment ID, if applicable. For this reason, agencies may choose to expire the information on these windows at the time of an employee's separation to another agency. To expire the information, enter the appropriate date in the Expiration Date field. The receiving agency will populate the fields according to their specified purposes.

NOTE: User Defined Windows 8 and 9 (USR8 and USR9) are used by the Office of Administration.

NOTES